

I-SMART Data Reporting for Treatment Agencies

A brief outline of the I-SMART data entry process for a client who received a Placement Screening (Assessment) and Admission in the same episode is below.

Client Profile
Intake
Crisis and Placement Screening
Program Enrollment
Encounter Note
Unenroll from Assessment Program
Admission
Program Enrollment
Encounter Note: continue adding on until level of care or Tx is completed
If changing levels of care: Unenroll from Tx Program then enroll in next Program
If Discharging the client: Unenroll from Program
Discharge

The above constitutes a complete Case or Episode of Care.

In order to complete the state-required fields in I-SMART, complete the required fields (Dark and Soft Yellow only) in each of the following modules and screens.

To view a Webinar recording of the following presentation, please click the link below. The webinar is a .wmv file and lasts about one hour and five minutes. It includes all of the information in the instructions below. If you have Microsoft Media Player on your computer, it should open and begin simply by clicking the link.

[I-SMART Data Entry Webinar 3.30.11.wmv](#)

Placement Screening/OWI Assessment

- **Client List:** If client already exists in database as a Closed Case, choose client's **Activity List** hyperlink under **Actions** and **Start New Episode**. Or, if client does not already exist in the database, **Add Client**.

Client ID	Full Name	DOB	SSN	Gender	Actions
8801013456	20 test, Dec	1/1/1988	999-12-3456	Female	Profile Activity List
9710108548	Admission, TEDS	10/10/1987	485-47-8548	Male	Profile Activity List
6206087414	Admission10, TEDS	6/8/1962	632-14-7414	Female	Profile Activity List
7604079654	Admission11, TEDS	4/7/1976	231-58-9654	Male	Profile Activity List
6905035236	Admission12, TEDS	5/3/1969	415-78-6236	Male	Profile Activity List
6501026321	Admission2, TEDS	1/2/1965	524-89-6321	Female	Profile Activity List
7810150289	Admission3, TEDS	10/15/1976	258-98-0289	Male	Profile Activity List

Agency	Client ID	Client Name	DOB	SSN	Gender	Actions
Southeastern Community College	8001016789	Redneck, Jimmy Bob	1/1/1980	123-45-6789	Male	Activity List
Test Agency IDPH	8610223254	Test, Client	10/22/1966	125-96-3254	Female	Activity List

- ✓ **Add Client** will take you to the **Client Profile** screen.
- **Client Profile**

Client Profile for Example, Data

First Name: Provider Client ID:
 Middle Name: I-SMART ID:
 Last Name: Record Created By:
 Gender: Last Updated By:
 DOB: Created Date:
 SSN: Last Updated Date:
 Driver's License:

Ethnicity:
 Races: Selected Races:

[Cancel](#) [Save](#) [Finish](#)

Alternate Names			
Last Name	First Name	Middle Name	Actions

Addresses					
Address Type	Address	Confidential	Created	Updated	Actions
Client Home	65 Chester Lane Double Maria, IA 54545	No	7/17/2008	7/17/2008	Review Delete

- ✓ **Social Security #:** I-SMART currently accepts either the last 4 digits of any client's social security number or the client's complete number. If the client has no SS# or if it is unknown, the user can create a number by using the format 999-00-0001, 999-00-0002, etc., where the first three numbers are always 999. The agency will have to keep track of SS#'s it creates.

❖ **Next** will take you to the **Contact Info** screen.

- **Contact Info**

- ✓ **Home Phone #:** If no phone, enter 0000000000 (10 zero's).

Contact Info

Home Phone #: Created:
 Work Phone #: Updated:
 Mobile Phone #:
 Other Phone #:
 Fax #:
 Email Address:

[Add Address](#)

Address Type	Address	Confidential	Created	Updated	Actions

[Cancel](#) [Save](#) [Finish](#) [Previous](#) [Next](#)

- ✓ **Add Address** will open the Address Information page. (See next page)

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I-SMART Training

User: Coordinator, Data
Loc: Iowa Dept. of Public Health, Test Facility
Client: Example, Data | 4810090324

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Address Information

Address Type [Dropdown] Confidential [No]

Address Line 1* [Text Box]

Address Line 2 [Text Box]

City* [Text Box] State* [Dropdown] Zip* [Text Box]

Cancel Finish

- Complete the **Address Information** screen and click **Finish**.
 - ❖ **Finish** will take you back to the **Contact Info** screen.
 - ❖ **Finish** on the Contact Info screen will take you to the **Client List** screen.
- **Activity List:** In the left, choose **Activity List** link. This will open the client's **Episode List** screen. If it does not, navigate to the Episode List screen using the left menu. Click **Start New Episode**.

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Please select a case, or click Start New Episode.

Episode List for Example, Data

Start New Episode

Case #	Status	Facility	Intake By	Intake Date	Closed Date	Actions

- **Start New Episode** will open the **Intake Case Information** screen.
 - ✓ **Initial Contact:** How did the client first contact the agency? Usually the response is by phone.
 - ✓ **Date of First Contact** will be the date of that phone call.
 - ✓ **Special Initiatives** are projects funded by either Magellan or IDPH. Most users should enter **None** in this box.
 - ✓ Complete the screen and Click **Finish**.

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Intake Case Information

Intake Facility: Test Facility
Intake Staff: Coordinator, Data
Initial Contact: Phone
County of Res: 04-Appanoose
Source of Referral: 23-OWI
Referral Contact: Add Referral Contact Info
Case # 1
Case Status: Open Active
Date of First Contact: 3/16/2008
Intake Date: 3/17/2008
Pregnant: No
Due Date:
HIV Positive:
Past IV Drug Use: No
Presenting Problem (in Client's Own Words): I got arrested for OWI.
Special Initiative: Drug Endangered Children, Jail Based Assessment/Magellan Special Initiative, Jail Based Treatment/JUCS Jackson CADS, Methamphetamine/TCE Grant Only
Special Initiative Selected: None
Inter-Agency Service: Court/Legal Interface, Developmental Disabilities, DHS, Domestic Violence
Inter-Agency Service Selected:
Date Closed: Save & Close the Case
Cancel Save Finish

✓ **Finish** will take you to the Client's **Activity List** screen. The **Activity List** screen shows the user what data elements s/he has completed in the client file.

- **Placement Screening:** At the left hand menu choose **Crisis and Placement**.

✓ Choose **Add New Placement Screening**. This will open the Placement Screening Profile screen.

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Crisis and Placement Screening List

Record Type Crisis or Placement Screening Date Created By Updated By Actions

Add New Crisis Record
Add New Placement Screening

I-SMART Training - Microsoft Internet Explorer provided by Iowa Dept. of Public Health

User: Coordinator, Data
Loc: Iowa Dept. of Public Health, Test Facility
Client: Example, Data | 4810090324 | Case #: 1

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Placement Screening/OWI Profile

Full Name: Example, Data
County of Res. Appanoose
Referral Source: OWI
Race: American, Black/African American, Cuban
Gender: Female
DOB: 10/9/1948
Ethnicity: American
Age: 59
Basis for Decision
Potential Client for SA
Potential Client for MH
Potential Client for TBI
Treating Here For: 1-SA
Est. Duration of TX (days)
Days Waiting: 2
Client Type
Admission Type
Admission Staff: Coordinator, Data
Placement Screening Date: 3/17/2008
Screening/Admission for Concerned Person: No
Crisis Intervention Date:
of Prior SA TX Admissions in the Last 10 Years: 0
of Non-TX SA Related Hospitalizations in Past 6 Months: 0
of Prior MH TX Admissions: 0
of Prior MH Hospitalizations: 0
of Months Since Last Discharge: 0
Past IV Drug Use: No
Mental Health Problem: No
Methadone Maintenance Planned: No
Education: 14-14 Years
Veteran Status: 0-None
Pregnant: No
Due Date:
Cancel Save Finish Next

✓ **Days Waiting:** Difference between the **Date of First Contact** on the Intake screen and the **Placement Screening Date**.

- ✓ **Placement Screening Date:** Date the Assessment was completed.
- ✓ **Screening/Admission for Concerned Person** response is almost always **No**. Choose **Yes** only if you are screening a friend/family member of a substance abuse client.

❖ Next will take you to the **Financial/Household** screen.

- **Financial/Household**

The screenshot shows the 'I-SMART Training' interface in Microsoft Internet Explorer. The user is 'Coordinator, Data' at the 'Iowa Dept. of Public Health, Test Facility'. The client is 'Example, Data | 4818990224 | Case #1'. The screen is titled 'Client Placement Screening/OWI for Example, Data'.

Financial Info

- Employment Status: NL02-Student
- Primary Income Src: 11-Wages/Salary
- Months Emp in Last 6 Months: 6
- Expected Payment Src: 11-Client Self Pay
- Employer: [Empty]
- Insurance Type: Blue Cross/Blue Shield
- Occupation: 2-Sales/Clerical
- Annual Household Income: [Empty]
- Covers Substance Abuse Treatment: Yes
- Client's Monthly Gross: \$6,666.00

Other Income Sources

- 00-None
- 11-Wages/Salary
- 13-Public Assistance
- 12-Family/Friends

Household Composition

- Household Composition: [Empty]
- Marital Status: 2-Married
- Living Arrangement: 13-With significant other
- # of People Living With Client: [Empty]
- # of Children Under 17 Living/Not Living w/Client: 0
- # of Children Spent Last 6 Mos Living w/Client: [Empty]
- Children Living With Someone Else Because of Protection Order: [Empty]

Relation to Client

- Aunt(s)
- Brother(s)
- Daughter(s)

Buttons: Cancel, Save, Finish, Previous, Next

❖ Next takes the user to the **Substance Abuse** screen.

- **Substance Abuse**

The screenshot shows the 'I-SMART Training' interface in Microsoft Internet Explorer. The user is 'Coordinator, Data' at the 'Iowa Dept. of Public Health, Test Facility'. The client is 'Example, Data | 4818990224 | Case #1'. The screen is titled 'Client Placement Screening/OWI for Example, Data'.

Substance Abuse

Rank	Substance	Severity	Frequency	Method
Primary:	21-Alcohol	[Empty]	12-1 to 2 times per week	1-Oral
Secondary:	22-Cocaine/Crack	[Empty]	12-1 to 2 times per week	2-Smoking
Tertiary:	00-None	N/A	N/A	N/A

Was the Substance prescribed to the client? Primary: No Secondary: No Tertiary: N/A

At what age did the client FIRST use the substances indicated above (If unknown, enter "97"; if not applicable, enter "96"):

of DAYS since LAST use of the substances indicated above:

Primary: [Empty] Secondary: [Empty] Tertiary: [Empty]

of Days Abstinent in Last 30 Days: [Empty]

of Days in Support Group in Last 30 Days: [Empty]

of Days Attended AA/NA/Similar Meetings in Last 30 Days: 0

of Days of Work/School Missed in Last 6 mo. Due to SA Related Problems: 0

Other Addictions

- 5-Gambling
- 3-Compulsive Disorder
- 4-Eating Disorder
- 6-Other

Selected Other Addictions

- 0-None

Does Client Currently Use Tobacco: 2-Cigars or Pipes

Daily Frequency of Cigarette Use: No cigarette use

Last SA Env. in Last 10 Yrs: 00-No Previous Admission

Comments: [Empty]

Buttons: Cancel, Save, Finish, Previous, Next

- ✓ Note that the maximum number entered in the “# of Days Attended AA/NA/Similar Meeting in Last 30 Days” is 30.

❖ **Next** will take the user to the **Legal History** screen.

- **Legal History**

❖ **Next** takes the user to the **ASAM** screen.

- **ASAM:** When doing a **Placement Screening/OWI** only the **Recommended Environment** is required.

❖ **Finish** will take the user to the client’s **Activity List** screen showing the current Placement Screening.

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User: Coordinator, Data
Loc: Iowa Dept. of Public Health, Test Facility
Client: Example, Data | 4810090324 | Case #: 1

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Crisis and Placement Screening List

[Add New Crisis Record](#)
[Add New Placement Screening](#)

Record Type	Crisis or Placement Screening Date	Created By	Updated By	Actions
Placement Screening/OWI	3/17/2008	Coordinator, Data	Coordinator, Data	Review

- **Program Enrollment:** User must enroll the client in a program to record the services delivered. **Program Enroll** in the left-hand menu will open the Program Enrollment list screen.

- ✓ Choose **Add Enrollment** to open the Program Enrollment screen.

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Program Enrollment

[Add Enrollment](#)

Program Name	Start Date	End Date	Facility	Notes	Actions

Finish Previous Next

- ✓ **Add Enrollment:** This will open the enrollment screen for editing.

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Program Enrollment Profile

Facility: Test Facility
Program Name: Assessment
Start Date: 3/17/2008
End Date: 3/17/2008
Program Staff: Coordinator, Data
Termination Reason: Assessment Completed
Notes:
Cancel Save Finish

- ✓ **Program Name:** Choose **Assessment** program.
- ✓ **Program Staff:** The name chosen is up to the user.
- ✓ **Start Date:** Note the Start Date of the program enrollment will default to today's date. User must change it to the date of the assessment.
- ✓ **End Date:** The date the client was last seen during the assessment. Usually the same as Start Date.
- ✓ **Reason for Termination:** **Assessment Completed.**

- ❖ **Finish** will close the screen and place the Program Name and other info on the **Program Enrollment List** as shown below.

Program Enrollment List - Microsoft Internet Explorer provided by Iowa Dept. of Public Health

User: Coordinator, Data
Loc: Iowa Dept. of Public Health, Test Facility
Client: Example, Data | 4010090324 | Case #: 1

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Program Enrollment [Add Enrollment](#)

Program Name	Start Date	End Date	Facility	Notes	Actions
Assessment	3/17/2008	3/17/2008	Test Facility		Review Delete

[Finish](#) [Previous](#) [Next](#)

- ❖ **Finish**: This will take the user to the **Activity List** screen.

Client Activity List

Activity	Activity Date	Created Date	Status	Actions
Client Information (Profile)	3/17/2008	7/17/2008	Completed	Review
Intake Transaction	3/17/2008	7/17/2008	Completed	Review
Client Program Enrollment (Assessment)	3/17/2008	7/17/2008	Completed	Review
Placement Screening	3/17/2008	7/17/2008	Completed	Review

- **Notes**: From the left menu, choose **Notes**; then choose **Add New Billable Note**.

Notes List [Add New Billable Note](#) [Print Notes](#)

Note Type	Date	Duration	Staff	Service Summary	Actions

- **Encounter Profile**

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I-SMART Training

User: Coordinator, Data
Loc: Iowa Dept. of Public Health, Test Facility
Client: Example, Data | 4810896324 | Case #: 1

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At least one Ancillary Service must be entered on the Encounter-Services screen.
At least one Medication must be entered on the Encounter-Services screen.

Encounter For Example, Data

Encounter Type: Individual Notes Event Type: Placement Screening/OWI
Tx ID: Created Date:
Service: 90801 - Psychiatric diagnostic interview examination
Program Name: 19-Assessment : 3/17/2008 - 3/17/2008
Service Location: Office Start Date: 3/17/2008 End Date: 3/17/2008
Start Time: End Time:
Substance Abuse Medication: Medication Free Duration: 60 Min
Emergency: # of Sessions: 1
Rendering Staff: Coordinator, Data Primary Payment Src: 11-Client Self Pay
Supervising Staff: Other Payment Src: 10-NA No Other Pay Source
Referring Phys:
Cancel Save Finish Next

- ✓ **Encounter Type: Individual Note**
- ✓ **Event Type: Placement Screening/OWI**
- ✓ **Service: 90801**
- ✓ **Program Name: Assessment**
- ✓ **Service Location:** Defaults to location specified when the facility is set up. Most users prefer this to default to Office. Contact IDPH for this option.
- ✓ **Substance Abuse Medication:** usually **Medication Free** unless client is taking Methadone, Antabuse or some other drug prescribed to help inhibit drug use.
- ✓ **Start Date and End Date** are usually the same date.
- ✓ **Duration:** enter length of session in minutes
- ✓ **# of Sessions:** usually 1
- ✓ **Primary Payment Src:** populated by the choice from **Admission** module.
- ✓ **Other Payment Src:** are any other sources providing payment for service?

At least one Ancillary Service must be entered on the Encounter-Services screen.
At least one Medication must be entered on the Encounter-Services screen.

Encounter For Example, Data

The above alerts will appear if the user clicks Save. They are simply reminders to do the Ancillary Services screen next.

- ❖ **Next** will take the user to the **Ancillary Services** screen showing the current Placement Screening.

- **Ancillary Services**

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User: Coordinator, Data
Loc: Iowa Dept. of Public Health, Test Facility
Client: Example, Data | 4010090524 | Case # 1

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Ancillary Services Rendered for Example, Data

TX Start Date: 3/17/2008
TX End Date: 3/17/2008

Ancillary Services: Child Care, Educational, Financial Counseling, Gambling
Ancillary Services Rendered: None

Medications: Antabuse, LAAM, Methadone, Naltrexone, Other
Medications Rendered: None (None)

Frequency: [Dropdown]

Cancel Save Finish Previous

✓ **Ancillary Services:** These are services the client receives while in treatment. They may be provided by either the treatment provider or an outside agency.

✓ **Medications/Frequency:** These relate to the **Substance Abuse Medication** field on the **Encounter** screen. Choose the appropriate medication listed. Remember, this is a listing of only those medications a client might use to inhibit his/her substance use. Do not list anti-depressants, anti-anxiety agents or other psychotropic medications a client might receive.

❖ **Finish** will return the user to the Encounter List screen.

- **Intake:** Using the left menu navigate to the **Intake** screen.

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Intake Case Information

Intake Facility Test Facility
Intake Staff Coordinator, Data
Initial Contact Phone
County of Res. 04-Appanoose
Source of Referral 29-OWM
Referral Contact

Case # 1
Case Status Closed
Date of First Contact 3/16/2008
Intake Date 3/17/2008
Pregnant No
Due Date

HIV Positive
Past IV Drug Use No

Presenting Problem (In Client's Own Words)
I got arrested for OVI

Special Initiative
Drug Endangered Children
Jail Based Assessment/Magellan Special Initiative
Jail Based Treatment/JCS Jackson CADS
Methamphetamine/COC Grant Only
Inter-Agency Service
Court/Legal Interface
Developmental Disabilities
DHS
Domestic Violence

Special Initiative Selected
None

Inter-Agency Service Selected

Date Closed 3/17/2008 Re-Open Case

Finish

✓ If the client is being seen for only an assessment and will not be admitted to treatment, enter the end date of the **Placement Screening** in the **Date Closed** field and then choose the **Save & Close the Case** link. **Save & Close the Case** will change the screen to gray as above. This action closes the client file for editing and enables the user to identify the Placement Screening as a separate case number.

❖ **Finish** will return the user to the Activity List. Note that the user can now tell whether s/he has completed all required elements by looking at the Activity List. A completed Placement Screening (Assessment) data entry for any client should look like the list below with five activities completed.

Activity	Activity Date	Created Date	Status	Actions
Client Information (Profile)	3/17/2008	7/17/2008	Completed	Review
Intake Transaction	3/17/2008	7/17/2008	Completed	Review
Client Program Enrollment (Assessment)	3/17/2008	7/17/2008	Completed	Review
Encounter Summary	3/17/2008	3/17/2008	Not Applicable	Review
Placement Screening	3/17/2008	7/17/2008	Completed	Review

- If the client is going to be admitted to treatment at your agency within 30 days of the Assessment, the user can leave the case open. When the user is ready to admit the client, simply go to the client file Activity List and click on the Admission Module in the left menu.

Admission to Treatment

Data entry processes for Admission are virtually the same as for Placement Screening/OWI.

In Iowa, most agencies will create a new assessment for any client that has not been assessed in the prior 30 days. If the client has been assessed in the 30 days prior to admission, the user can

1. choose to reopen the client's Placement Screening case (Data Example's Case #1) and continue on in that case with the Admission, Encounters and Discharge, or,
2. keep the Placement Screening case closed and start a new episode of care to document the Admission as a separate case (Case #2).

Either is permissible.

The following example assumes the client Data Example is being Assessed and Admitted to treatment on successive days.

- **Client List:** Since the client already exists in the database as an open case, the user can find the client at the Client Search screen and click **Activity List**. Then choose **Admission** in the left menu. Now the user can enter the client's data into the Admission module.
- **Admission**
 - ✓ **Profile:** Enter the **Event Type** as **Admission**.

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Your admission data is populated from existing Placement Screening record.

Admission Profile

Full Name: Example, Data **County of Res.** Appanoose

Referral Source: OMI **Race:** American Indian/Black/African American

Gender: Female **Ethnicity:** Cuban

DOB: 10/9/1948 **Age:** 59

Basis for Decision

Potential Client for SA: **Treating Here For:** 1-SA

Potential Client for MH: **Est. Duration of TX (days):**

Potential Client for TBI: **Days Waiting:** 2

Client Type: **Event Type Admission:**

Admission Type: First admission **Admission Date:**

Admission Staff: Coordinator, Data **Placement Screening Date:** 3/17/2008

Screening/Admission for Concerned Person: No **Crisis Intervention Date:**

of Prior SA TX Admissions in the Last 10 Years: 0 **Past IV Drug Use:** No

of Non-TX SA Related Hospitalizations in Past 6 Months: 0 **Mental Health Problem:** No


of Prior MH TX Admissions: **Methadone Maintenance Planned:** No

of Prior MH Hospitalizations: **Education:** 14-14 Years

of Months Since Last Discharge: 0 **Veteran Status:** 0-None

Pregnant: No **Due Date:**

Cancel Save Finish Next

Note the alert that  Your admission data is populated from existing Placement Screening record.

This means that the data from the Placement Screening is being used to populate the Admission module data. The user does not have to enter any more demographic data into the Admission module unless something has changed in the client's life between Assessment and Admission.

- **Days Waiting:** Note that the Days Waiting field shows 2. The Days Waiting field is being populated from Placement Screening, but since the Admission is the day after Assessment, the user must change this to 1 day.
- ✓ The **ASAM** screen is the next screen requiring the user's attention. Click on **ASAM** on the left menu.
 - **ASAM:** When doing an **Admission**, the **Recommended Environment** and **Actual Environment** may differ. If they do, **Clinical Override** should reflect the reason for the difference. If they are identical, then **Clinical Override** should show **0-N/A**.

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ASAM — PPC2R

Dimension	Level of Risk	Level of Care	Comments
1 - Acute Intoxication and/or Withdrawal Potential	<input type="text"/>	<input type="text"/>	<input type="text"/>
2 - Biomedical Conditions and Complications	<input type="text"/>	<input type="text"/>	<input type="text"/>
3 - Emotional, Behavioral, or Cognitive Conditions and Complications	<input type="text"/>	<input type="text"/>	<input type="text"/>
4 - Readiness to Change	<input type="text"/>	<input type="text"/>	<input type="text"/>
5 - Relapse, Continued Use, or Continued Problem Potential	<input type="text"/>	<input type="text"/>	<input type="text"/>
6 - Recovery / Living Environment	<input type="text"/>	<input type="text"/>	<input type="text"/>

Recommended Environment: 19-Extended outpatient **Clinical Override:** 0-N/A

Actual Environment: 19-Extended outpatient

ASAM Notes:

Cancel Save Finish Previous Next

❖ **Next**

- **Program Enrollment:** Since the client is continuing on in Case #1, the Program Enrollment List screen reflects one ended program enrollment. The client must now be enrolled in the next program.

❖ **Add Enrollment**

Program Enrollment List - Microsoft Internet Explorer provided by Iowa Dept. of Public Health

User: Coordinator, Data
Loc: Iowa Dept. of Public Health, Test Facility
Client: Example, Data | 4610090324 | Case #: 1

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Program Enrollment

Program Name	Start Date	End Date	Facility	Notes	Actions
Assessment	3/17/2008	3/17/2008	Test Facility		Review Delete

[Add Enrollment](#)

Finish Previous Next

❖ **Enroll client in the appropriate program**

1. If the client is changing levels of care (e.g. going from IOP to EOP) then she/he should be unenrolled from the first program and then enrolled in the new program.
2. **Start Date** defaults to today's date. Make sure to change it to the correct date of program enrollment.

Program Enrollment Profile - Microsoft Internet Explorer provided by Iowa Dept. of Public Health

User: Coordinator, Data
Loc: Iowa Dept. of Public Health, Test Facility
Client: Example, Data | 4610090324 | Case #: 1

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Program Enrollment Profile

Facility: Test Facility
Program Name: Extended Outpatient
Start Date: 3/18/2008
End Date:
Program Staff: Coordinator, Data
Termination Reason:
Notes:

Cancel Save Finish

❖ **Finish** takes the user to the **Program Enrollment** screen listing both program enrollments.

Program Enrollment List - Microsoft Internet Explorer provided by Iowa Dept. of Public Health

I-SMART Training User: Coordinator, Data Loc: Iowa Dept. of Public Health, Test Facility Client: Example, Data | 4810090524 | Case #: 1 June 2008, Rev 1 Print View Logout

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Program Enrollment Add Enrollment

Program Name	Start Date	End Date	Facility	Notes	Actions
Extended Outpatient	3/18/2008		Test Facility		Review Delete
Assessment	3/17/2008	3/17/2008	Test Facility		Review Delete

Finish Previous Next

❖ Next takes the user to the **Encounter List** screen.

❖ Add Encounter Record

Encounter List - Microsoft Internet Explorer provided by Iowa Dept. of Public Health

I-SMART Training User: Coordinator, Data Loc: Iowa Dept. of Public Health, Test Facility Client: Example, Data | 4810090524 | Case #: 1 June 2008, Rev 1 Print View Logout

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Encounter List Add Encounter Record

Tx ID	Start Date	Service	Duration	Rendering Staff	Program Name	Status	Actions
50	3/17/2008	90801 - Psychiatric diagnostic interview examination	60	Coordinator, Data	Assessment	Not Released	Review

- **Notes:** Complete an **Encounter Note** for all services rendered throughout the course of treatment.

✓ **Encounter Profile**

The user can complete Encounters in one of two ways.

1. One Encounter for each individual service rendered. Every time a client is seen for a direct service, a new Encounter is entered.

❖ If a client is seen for 4 individual sessions and 4 group sessions, the user would enter 8 separate Encounter records.

I-SMART Training - Microsoft Internet Explorer provided by Iowa Dept. of Public Health

I-SMART Training User: Coordinator, Data Loc: Iowa Dept. of Public Health, Test Facility Client: Example, Data | 4810090524 | Case #: 1 June 2008, Rev 1 Print Report Print View Logout

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At least one Ancillary Service must be entered on the Encounter-Services screen.
At least one Medication must be entered on the Encounter-Services screen.

Encounter For Example, Data

Encounter Type: Group Note Event Type: Admission
Tx ID: Created Date:
Service: 90853 - Group psychotherapy (other than multi-family group)
Program Name: 19-Extended Outpatient : 3/18/2008 -
Start Date: 3/18/2008 End Date: 3/18/2008
Service Location: Office Start Time: End Time:
Substance Abuse: Medication Free Duration: 90 Min
Emergency: # of Sessions: 1
Rendering Staff: Coordinator, Data Primary Payment Src: 12-Blue Cross/Blue Shield
Supervising Staff: Other Payment Src: 11-Client Self Pay
Referring Phys:
Cancel Save Finish Next

2. One Encounter for all services of a certain Encounter Type.

- ❖ If a client is seen for 4 individual sessions and 4 group sessions, the user would enter 1 Encounter for the 4 individual sessions and 1 Encounter for the 4 group sessions.
- ❖ In the example below, the user has recorded 4 group sessions between 3/18/08 and 4/1/08 totaling 360 minutes. Next time the user wants to record another session, s/he can simply Review this Note. Then change the End Date to the date of the most recent session and add the number of minutes to the Duration total shown. # of Sessions would be increased by 1. In this example, if the client were seen in another group session on 4/4/08, the user would change the End Date to 4/4/08; then change the Duration to 450 (if the group was 90 minutes) and change the # of sessions to 5.

- ❖ **Event Type** is **Admission** since the client has been admitted to treatment.
- ❖ **Encounter Type: Individual, Group, Family or 24-hour Service.**
- ❖ **Service:** Choose the appropriate **CPT code**. The following are only suggestions as these seem to be the most frequently used codes.
 - Individual Therapy: 90804 or 90806
 - Group Therapy: 90853
- ❖ **Program Name:** This will list all programs in which the client is or has been enrolled. The current program will be listed with a start date, but no end date (e.g. Extended Outpatient 3/18/2008-).
 - **If you are recording Encounters in a new level of care, make sure the client has been unenrolled from the old program and enrolled in the new one.**
- ❖ **Substance Abuse Medication:** usually **Medication Free** unless client is taking Methadone, Antabuse or some other drug prescribed to help inhibit drug/alcohol use.
- ❖ For **Individual, Group and Family Note** documentation: The user may either enter a new Encounter each time the client attends a treatment session or enter a range of dates, accumulated minutes or days (use Days for **24-hour Service only**) and an accumulated number of sessions.
- ❖ **Note:** IDPH recommends entering data at least monthly. That means each month you will create a new Encounter for Individual therapy, a new Encounter for group therapy, and so on.
 - Some agencies that enter data at the end of each month and do not care to track individual sessions choose to
 1. simply change the Encounter End Date to the end of the month,
 2. add on that month's accumulated minutes or days to last months total, and then

3. and add the accumulated number of sessions to the existing total.
- ❖ **For 24-hour Services:** The Encounter date range should reflect the clients complete stay in the 24-hour service. This must be entered in days.

✓ **Ancillary Services:** must be completed each time a new encounter is entered. The user need not complete a new one if she/he is simply updating the **Encounter** with new monthly **End Date**, **Duration** and **# of Sessions** information.

- ❖ **Ancillary Services:** Enter any service the client is receiving while in treatment whether or not your agency is providing the service.

- ❖ **Medications/Frequency:** If entering **None**, remember that you must also enter **None** for **Frequency**.

- The case remains open until the client is ready to be discharged from treatment.

Discharge from Treatment

A Discharge must be completed on all clients that have been admitted to a treatment program.

- **Program Enrollment:** The client must be unenrolled from all programs before you can **Discharge** her.
- ✓ **Unenroll** Client from the program
 - ❖ Click on the program's **Review** hyperlink on **Program Enrollment** List.

WITS I-SMART Training User: Cleland, Lonnie
Loc: Iowa Dept. of Public Health, Test Facility
Client: Example, Data | 4810090324 | Case #: 1

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Program Enrollment [Add Enrollment](#)

Program Name	Start Date	End Date	Facility	Notes	Actions
Extended Outpatient	3/18/2008	7/10/2008	Test Facility		Review Delete
Assessment	3/17/2008	3/17/2008	Test Facility		Review Delete

[Finish](#)

❖ Enter a date in the Program Enrollment Profile's **End Date** field.

WITS I-SMART Training User: Cleland, Lonnie
Loc: Iowa Dept. of Public Health, Test Facility
Client: Example, Data | 4810090324 | Case #: 1

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Program Enrollment Profile

Facility: Test Facility

Program Name: Extended Outpatient

Start Date: 3/18/2008

End Date: 7/10/2008

Program Staff: Coordinator, Data

Termination Reason: Admin termination

Notes:

[Cancel](#) [Save](#) [Finish](#)

➤ **Termination Reason:** Choose appropriate reason.

- On the left menu click the **Discharge** Module.

✓ **Profile:** Fields required in the following screens is dependent upon the **Reason for Termination**. Complete all dark and soft yellow fields.

I-SMART - Microsoft Internet Explorer provided by Iowa Dept. of Public Health

User: Cleland, Lonnie
Loc: Iowa Dept. of Public Health, Test Facility
Client: Example, Manual | 6711058767 | Case #: 1

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Discharge Profile for Example, Manual

Discharged: 6/30/2006

Date of Last Contact: 2/4/2006

Past IV User: No

Discharge Staff: Cleland, Lonnie

Discharge Referral:

Reason: 21-Completed Treatment - Treatment Plan Completed

Disposition:

ASAM Criteria

Dimension	At Intake	Level of Risk	Level of Care	Comments
1 - Acute Intoxication and/or Withdrawal Potential	At Intake	2	1.0	Testing
	At Discharge			
2 - Biomedical Conditions and Complications	At Intake			
	At Discharge			
3 - Emotional, Behavioral, or Cognitive Conditions and Complications	At Intake			
	At Discharge			
4 - Readiness to Change	At Intake			
	At Discharge			
5 - Relapse, Continued Use, or Continued Problem Potential	At Intake			
	At Discharge			
6 - Recovery / Living Environment	At Intake			
	At Discharge			

[Cancel](#) [Save](#) [Finish](#) [Next](#)

❖ Click **Next** to move to the **Legal** screen.

✓ Legal

I-SMART - Microsoft Internet Explorer provided by Iowa Dept. of Public Health

I-SMART User: Cleland, Lonnie
Loc: Iowa Dept. of Public Health, Test Facility
Client: Example, Manual | 0711058787 | Case #: 1

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Client Discharge for Example, Manual

Legal History

Legal Status
None/No Involvement
No Response
Commitment
Court order for observation and evaluation

Selected Legal Status

of Arrests in Lifetime
of Arrests in Past 30 Days

Number of arrests since admission due to:
OWI

Non-Drug/Alcohol Related Crime While Under the Influence
Non-Drug/Alcohol Related Crime While NOT Under the Influence
Drug/Alcohol Related Crime

Total# of Arrests Since Admission

Cancel Save Finish Previous Next

❖ Next

✓ Status

I-SMART - Microsoft Internet Explorer provided by Iowa Dept. of Public Health

I-SMART User: Cleland, Lonnie
Loc: Iowa Dept. of Public Health, Test Facility
Client: Example, Manual | 0711058787 | Case #: 1

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Client Discharge for Example, Manual

Status Changes Since Admission

Status At Admission

Pregnant No
Relationship Status 2-Married
Living Arrangement 13-With significant other alone
Employment Status E01-Employed Full Time
Occupation 1-Professional/Managerial
Primary Income Source 11-Wages/Salary
Client's Monthly Gross \$5,000.00
of Months Employed 6
of Missed Work/School Days Due to SA Related Problems 0
Enrolled In Education
of Days Attended AA/NA/Similar Meetings in Last 30 Days 0
Times Hospitalized Due to SA Related Problems 0
County of Residence Calhoun
Education 15 Years
Veteran Status None
of Children Under 17 Living or not Living With Client 6
of Children Spent Last 6 Months Living With Client 0
Children Living With someone Else Because of Protection Order No

Status At Discharge

Pregnant No
Relationship Status 2-Married
Living Arrangement 13-With significant other alone
Employment Status E01-Employed Full Time
Occupation 1-Professional/Managerial
Primary Income Source 11-Wages/Salary
Client's Monthly Gross \$5,000.00
of Months Employed Since Admission to TX 6
of Missed Work/School Days Since Admission to TX Due to SA Related Problems 0
of Days Attended AA/NA/Similar Meetings in Last 30 Days 0
Times Hospitalized Since Admission to TX Due to SA Related Problems 0
County of Residence 13-Calhoun
Education 15-15 Years
Veteran Status 0-None
of Children Under 17 Living or not Living With Client 6
of Children Spent Last 6 Months Living With Client 0
Children Living With someone Else Because of Protection Order No

Cancel Save Finish Previous Next

✓ Substance Abuse

I-SMART - Microsoft Internet Explorer provided by Iowa Dept. of Public Health

User: Cleland, Lonnie
Loc: Iowa Dept. of Public Health, Test Facility
Client: Example, Manual | 6711058787 | Case #: 1

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Client Discharge for Example, Manual

Substance Abuse

Rank	Substance	Severity	Frequency	Method
Primary:	21-Alcohol		10-No use in the past mo	1-Oral
Secondary:	00-None	N/A	N/A	N/A
Tertiary:	00-None	N/A	N/A	N/A

Was the Substance prescribed to the client? Primary ☒ No Secondary N/A Tertiary N/A

Was Methadone Maintenance Part of TX ☒ No Other Addictions
Does Client Currently Use Tobacco ☒ 0-No Tobacco Use
Daily Freq of Cigarette Use ☒ No cigarette use

3-Compulsive Disorder
4-Eating Disorder
5-Gambling
6-Other

Selected Other Addictions
0-None

Discharge Parameters

Discharge Status: Treatment
Post-Discharge Case Management # of Days
Prognosis
Was a family member involved
Was Concerned Person Involved ☒ Yes
Codependent/Collateral

Did IDPH Pay For Any Portion of Tx ☒ No
Did Medicaid Pay For Any Portion of Tx ☒ No
As a Result of Evaluation, Was Psychiatric Problem Determined ☒ No
Psychiatric Follow-up

Cancel Save Finish Previous Next

✓ Next

✓ Client Satisfaction

I-SMART - Microsoft Internet Explorer provided by Iowa Dept. of Public Health

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Loc: Iowa Dept. of Public Health, Test Facility
Client: Example, Manual | 6711058787 | Case #: 1

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Client Discharge for Example, Manual

Client Satisfaction at Discharge

In client's opinion, how beneficial was our counseling?

Overall	Beneficial	Comments
Individual	Beneficial	Comments
Family	Did Not Receive	Comments
Group	Beneficial	Comments
Educational	Did Not Receive	Comments

Cancel Save Finish Previous Next

❖ Finish

When clicking the **Finish** button you will be asked if you want to **Close the Case**. Choose **Yes**. **Close the Case**: Closing the case means that you are graying all fields out so they cannot be edited. It also means that when/if the client returns you will **Start New Episode**.

If I-SMART does not ask you this question, then navigate to the **Intake** screen to **Save and Close the Case** as you would a Placement Screening/OWI.